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# Military Market

MAGAZINE FOR THE MILITARY RESALE SYSTEM

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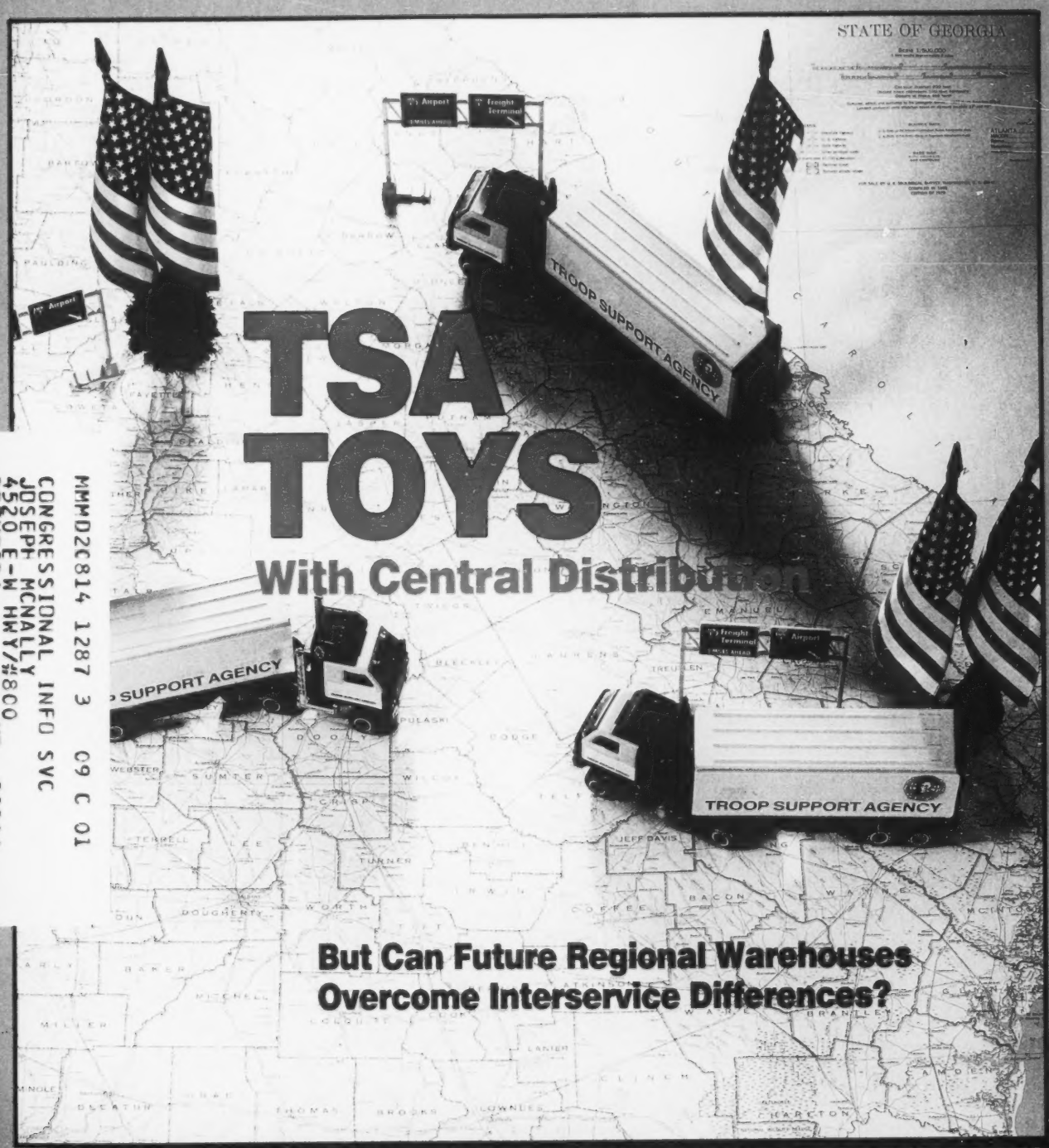


## TSA TOYS

### With Central Distribution

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CONGRESSIONAL INFO SVC
JOSEPH MCNALLY
4520 E-W HWY/#800
BETHESDA MD 20814

**But Can Future Regional Warehouses Overcome Interservice Differences?**

**PIZAZZ TO GO: BUYING SERVICES JAZZ UP MARINE CORPS EXCHANGES**

**IT'S BACK: THE LATEST DIRECTORY OF MILITARY DISTRIBUTORS**

Military Market
serving the military resale system

**EDITOR**
Nancy Tucker
**MANAGING EDITOR**
Robert A. Devaney
**ASSOCIATE EDITORS**
Beverly Jones, Gregory Wright
**OFFICE MANAGER**
Pattie Lykins
**NEWS SERVICE**
Martha Lynn Craver, Editor;
P.J. Budahn, David Fulghum,
Vesta Kimble, Rick Maze
**ART DIRECTOR**
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Kate Patterson, Tracy Woodward,
Francesca Scott
**ADVERTISING MANAGER**
Herbert Jacobs
**CIRCULATION MANAGER**
Joan Wurzburger
**EDITORIAL PRODUCTION**
Larry Jones
**ADVERTISING PRODUCTION**
Ann-Marie Saunders

**EXECUTIVE OFFICES**
6883 Commercial Drive
Springfield, Virginia 22159-0210
(703) 750-8676
**ADVERTISING SALES OFFICES**
1 Citicorp Center
153 East 53rd Street
New York, New York 10022
(212) 753-1040

SENIOR VICE PRESIDENT
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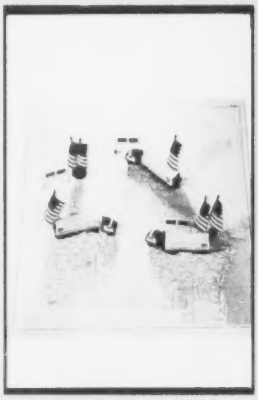

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# Direct Appropriated Fund Support DoD Commissary Retail Store Operations Fiscal 1988 President's Budget

## NUMBER OF STORES

| | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|
| ARMY | 179 | 179 | 179 | 179 |
| NAVY | 85 | 85 | 86 | 86 |
| MARINE CORPS | 15 | 15 | 15 | 15 |
| AIR FORCE | 142 | 151 | 154 | 154 |
| ***TOTAL*** | ***421*** | ***430*** | ***434*** | ***434*** |

## PERSONNEL END STRENGTH

| | 1986 | | 1987 | | 1988 | | 1989 | |
|---|---|---|---|---|---|---|---|---|
| | Mil. | Civ. | Mil. | Civ. | Mil. | Civ | Mil. | Civ |
| ARMY | 209 | 9,971 | 192 | 9,220 | 192 | 9,268 | 192 | 9,267 |
| NAVY | 1,536 | 2,851 | 1,240 | 2,873 | 1,230 | 2,889 | 1,036 | 3,178 |
| MARINE CORPS | 1 | 861 | 2 | 801 | 2 | 801 | 2 | 801 |
| AIR FORCE | 426 | 7,953 | 443 | 8,076 | 470 | 7,641 | 471 | 7,995 |
| ***TOTAL*** | ***2,172*** | ***21,636*** | ***1,877*** | ***20,970*** | ***1,894*** | ***20,599*** | ***1,701*** | ***21,241*** |

## MILITARY PERSONNEL FUNDS

| | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|
| ARMY | $6,391 | $6,059 | $5,598 | $5,588 |
| NAVY | 40,255 | 38,715 | 35,176 | 32,387 |
| MARINE CORPS | 35 | 72 | 72 | 72 |
| AIR FORCE | 12,525 | 12,229 | 13,057 | 13,463 |
| ***TOTAL*** | ***$59,206*** | ***$57,075*** | ***$53,903*** | ***$51,510*** |

## OPERATIONS AND MAINTENANCE (civilian pay)

| | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|
| ARMY | $188,365 | $197,416 | $215,205 | $215,437 |
| NAVY | 55,059 | 60,582 | 64,889 | 68,949 |
| MARINE CORPS | 17,187 | 17,940 | 19,227 | 19,288 |
| AIR FORCE | 161,444 | 172,595 | 174,365 | 175,886 |
| ***TOTAL*** | ***$422,055*** | ***$448,533*** | ***$473,686*** | ***$479,560*** |

## OPERATIONS AND MAINTENANCE (non-personnel, excluding overseas transportation)

| | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|
| ARMY | $7,061 | $15,686 | $19,053 | $24,446 |
| NAVY | 23,884 | 22,707 | 24,467 | 27,037 |
| MARINE CORPS | 1,115 | 1,028 | 1,096 | 1,233 |
| AIR FORCE | 29,329 | 33,145 | 38,253 | 40,386 |
| ***TOTAL*** | ***$61,389*** | ***$72,566*** | ***$82,869*** | ***$93,102*** |

## OPERATIONS AND MAINTENANCE (overseas transportation)

| | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|
| ARMY | $45,981 | $37,782 | $33,092 | $33,388 |
| NAVY | 13,076 | 11,371 | 10,387 | 10,287 |
| MARINE CORPS | 219 | 228 | 236 | 244 |
| AIR FORCE | 33,095 | 28,113 | 23,961 | 24,979 |
| ***TOTAL*** | ***$92,371*** | ***$77,494*** | ***$67,676*** | ***$68,898*** |

## TOTAL OPERATIONS FUNDS

| | 1986 | 1987 | 1988 | 1989 |
|---|---|---|---|---|
| ARMY | $247,798 | $256,943 | $272,948 | $278,859 |
| NAVY | 132,274 | 133,375 | 134,919 | 138,660 |
| MARINE CORPS | 18,556 | 19,268 | 20,631 | 20,837 |
| AIR FORCE | 236,393 | 246,082 | 249,636 | 254,714 |
| ***TOTAL*** | ***$635,021*** | ***$655,668*** | ***$678,134*** | ***$693,070*** |

NOTE: Dollars are in thousands; years are fiscal years.

SOURCE: Department of Defense.

# Military Market index

## COMMISSARIES

| | | MAY | | | YEAR TO DATE | | |
|---|---|---|---|---|---|---|---|
| | | CY'87 | CY'86 | % CHANGE | CY'87 | CY'86 | % CHANGE |
| | CONUS | $162,277 | $164,769 | -1.51 | $786,936 | $780,868 | 0.78 |
| | OVERSEAS | 35,886 | 34,658 | 3.54 | 165,074 | 149,041 | 10.76 |
| **AIR FORCE** | TOTAL | **198,163** | **199,427** | **-0.63** | **951,989** | **929,909** | **2.37** |
| | CONUS | 117,915 | 117,495 | 0.36 | 555,450 | 542,955 | 2.30 |
| | OVERSEAS | 43,890 | 39,060 | 12.37 | 194,355 | 176,610 | 10.05 |
| **ARMY** | TOTAL | **161,805** | **156,555** | **3.35** | **749,805** | **719,565** | **4.20** |
| | CONUS | 60,099 | 56,819 | 5.77 | 308,226 | 296,884 | 3.82 |
| | OVERSEAS | 6,617 | 6,760 | -2.12 | 34,645 | 32,193 | 7.62 |
| **NAVY** | TOTAL | **66,716** | **63,579** | **4.93** | **342,872** | **329,077** | **4.19** |
| | CONUS | 14,335 | 14,977 | -4.29 | 67,797 | 71,317 | -4.94 |
| | OVERSEAS | 304 | 296 | 2.70 | 1,357 | 1,346 | 0.82 |
| **MARINE CORPS** | TOTAL | **14,639** | **15,273** | **-4.15** | **69,155** | **72,663** | **-4.83** |
| | CONUS | 232 | 281 | -17.44 | 1,240 | 1,283 | -3.35 |
| | OVERSEAS | 324 | 238 | 36.13 | 1,621 | 1,492 | 8.65 |
| **COAST GUARD** | TOTAL | **556** | **519** | **7.13** | **2,861** | **2,776** | **3.06** |
| | CONUS | $354,858 | $354,341 | 0.15 | $1,719,649 | $1,693,307 | 1.56 |
| **ALL** | OVERSEAS | $87,021 | $81,012 | 7.42 | $397,052 | $360,682 | 10.08 |
| **COMMISSARIES** | TOTAL | **$441,879** | **$435,353** | **1.50** | **$2,116,701** | **$2,053,989** | 3.05 |
| ***GROCERY STORES*** | *U.S.*[1] | *$24.594* | *$24.324* | *1.11* | *$116.244* | *$112.927* | *2.94* |

* Figures for Navy commissaries up to March 1986 have been adjusted to reflect previous errors. If you have any questions, please contact Joan Gleoggler at (703) 750-8196 for more information. ** Estimated

## EXCHANGES

| | | MAY | | | YEAR TO DATE | | |
|---|---|---|---|---|---|---|---|
| | | CY'87 | CY'86 | % CHANGE | CY'87 | CY'86 | % CHANGE |
| | CONUS | $276,197 | $254,131 | 8.68 | $1,230,536 | $1,164,028 | 5.71 |
| | OVERSEAS | 205,800 | 180,952 | 13.73 | 928,636 | 828,415 | 12.10 |
| **AAFES** | TOTAL | **481,997** | **435,083** | **10.78** | **2,159,172** | **1,992,443** | **8.37** |
| | CONUS[2] | 98,798 | 92,653 | 6.63 | 441,952 | 409,530 | 7.92 |
| | OVERSEAS[2] | 42,228 | 43,837 | -3.67 | 193,126 | 179,226 | 7.76 |
| **NAVY** | TOTAL[2] | **141,026** | **136,490** | **3.32** | **635,078** | **588,756** | **7.87** |
| | CONUS | 30,603 | 29,537 | 3.61 | 140,399 | 135,143 | 3.89 |
| | OVERSEAS | 5,428 | 5,277 | 2.86 | 23,982 | 24,052 | -0.29 |
| **MARINE CORPS** | TOTAL | **36,031** | **34,814** | **3.50** | **164,382** | **159,194** | **3.26** |
| | CONUS[3] | 7,250 | 7,398 | -2.00 | 32,190 | 32,847 | -2.00 |
| | OVERSEAS[3] | 540 | 551 | -2.00 | 2,398 | 2,446 | -1.96 |
| **COAST GUARD** | TOTAL[3] | **7,790** | **7,949** | **-2.00** | **34,588** | **35,293** | **-2.00** |
| | CONUS[4] | 1,297 | 1,144 | 13.37 | 7,424 | 6,655 | 11.56 |
| | OVERSEAS[4] | 2,147 | 2,755 | -22.07 | 10,608 | 16,668 | -36.36 |
| **MAIL ORDER** | TOTAL[4] | **3,444** | **3,899** | **-11.67** | **18,032** | **23,322** | **-22.68** |
| | CONUS | $414,145 | $384,863 | 7.61 | $1,852,501 | $1,748,203 | 5.97 |
| | OVERSEAS | $256,143 | $233,372 | 9.76 | $1,158,750 | $1,050,807 | 10.27 |
| **ALL EXCHANGES** | TOTAL | **$670,288** | **$618,235** | **8.42** | **$3,011,251** | **$2,799,010** | **7.58** |
| ***DEPARTMENT STORES*** | *U.S.*[1] | *$11.525* | *$11.165* | *3.22* | *$48.639* | *$46.021* | *5.69* |

1) SOURCE: U.S. Department of Commerce. 2) Does not include sales of ship stores. 3) MM estimate, based on official data. 4) Includes consolidated sales for all services, including Coast Guard. NOTE: Individual figures may not add to totals because of rounding. All sales are expressed in thousands (add 000), except grocery stores and department stores, which are in billions. Commissary sales include appropriate surcharges; exchange sales include concession volume.
NOTE: Distribution of sales by CONUS and overseas is based on definition by respective service and system. Figures do not include sales tax.